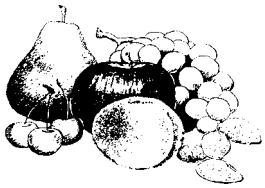
California Fruit & Nut Review



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HIGHLIGHTS IN THIS ISSUE:

AUGUST CROP COMMENTS

Fruit growers conducted cultural activities that included weed control, fungicide applications, and irrigation of trees and vines. Stone fruit harvest remained active throughout the month as later varieties reached maturity. Many stone fruit orchards were topped, pruned, irrigated, and treated for post harvest insect control as necessary. Harvest of table grapes continued in the San Joaquin Valley. Red Globe, Ruby Seedless, Autumn Royal, Thompson Seedless, Red Muscat and Crimson Seedless varieties were harvested.

Wine grape harvest began in August and gathered momentum by the end of the month. Grapes for raisins were laid down on trays. Harvest of Granny Smith, Macintosh and Gala apple varieties commenced during August. Prune harvest began. Bartlett pear harvest was active in Lake and Mendocino Counties. Good fruit development in Asian pear orchards was reported due to moderate weather conditions. Treatments for fruit fly and Red Scale continued in olive orchards. Fig and pomegranate harvesting continued. Harvest of early variety almonds began during the first week of August and had gained momentum the end of August. Walnuts, pistachio and pecan growers were preparing their orchards for harvest by month's end. The Valencia orange harvest remained slow throughout the month due to a lack in demand. Summer grapefruit harvest came to an end in many locations. Lemons were picked in the coastal areas of the State throughout August, while picking in some desert locations began late in the month. New crop Navel oranges continued to mature.

FRUIT AND NUT STATISTICS AT A GLANCE

Crop	Bearing Acreage		Yield Per Acre		Estimated Production		Production Percent Change	Next Crop Update
	2001	2002	2001	2002	2001	2002		
NUT CROPS	Acres		Pounds		1,000 Pounds			
Almonds (Shelled)	525,000	530,000	1,580	1,850	830,000	980,000	18	January 2003
Pecans	2,600	---	1,420	---	3,700	---		October 11, 2002
Pistachio (In-Shell)								
Marketable In-Shell	---	---	---	---	127,000	---		
Shelling Stock	---	---	---	---	34,000	---		
Total	78,000	83,000	2,060	3,370	161,000	280,000	74	January 2003
			Tons		1,000 Tons			
Walnuts (In-Shell)	196,000	200,000	1.56	1.38	305.0	275.0	-10	January 2003
FRUIT CROPS								
Apples	29,000	26,000	12.10	11.50	350.0	300.0	-14	January 2003
Apricots	18,000	17,000	4.28	5.00	77.0	85.0	10	January 2003
Cherries	25,000	26,000	2.21	2.50	55.3	65.0	18	January 2003
Grapes, Raisin 1/	276,000	273,000	9.36	10.40	2,199.0	2,550.0	16	October 11, 2002
Grapes, Table	88,000	88,000	8.07	8.75	710.0	770.0	8	October 11, 2002
Grapes, Wine	480,000	491,000	6.36	6.52	3,053.0	3,200.0	5	October 11, 2002
Grapes, All	844,000	852,000	7.38	7.90	5,930.0	6,520.0	10	October 11, 2002
Olives	36,000	36,000	3.72	2.50	134.0	90.0	-33	January 2003
Peaches, Clingstone	28,800	30,700	16.50	17.10	476.0	525.0	10	January 2003
Peaches, Freestone	39,000	39,000	9.94	10.60	387.5	415.0	7	January 2003
Pears, Bartlett	14,000	13,500	19.60	19.30	275.0	260.0	-5	January 2003
Pears, Other	4,300	4,300	6.98	6.98	30.0	30.0		January 2003
Plums, Dried 2/	86,000	76,000	1.74	2.04	150.0	155.0	3	January 2003
BERRIES			Cwt.		1,000 Cwt.			
Strawberries	26,400	28,500	525	490	13,860	13,965	1	December 10, 2002
CITRUS CROP 3/	2000-01	2001-02	2000-01	2001-02	2000-01	2001-02		
			Cartons		1,000 Cartons			
Grapefruit	15,400	15,000	844	853	13,000	12,800	-2	September 19, 2002
Lemons	49,500	49,500	917	889	45,400	44,000	-3	September 19, 2002
Oranges, Navel	128,000	127,500	531	627	68,000	80,000	18	October 11, 2002
Oranges, Valencia	66,500	66,500	632	662	42,000	44,000	5	September 19, 2002
Tangerines 4/	8,800	9,000	477	511	4,200	4,600	10	September 19, 2002

1/ The Raisin Industry Diversion Program (RID) had 41,000 acres enrolled for 2001 and 27,000 acres for 2002.
2/ Forecast carried forward from June 2002.
3/ Grapefruit - 33.5 lbs. per carton, Lemons - 38.0 lbs. per carton, Oranges - 37.5 lbs. per carton, Tangerines - 37.5 lbs. per carton.
4/ Includes tangelos, tangerines, and tangors.

CALIFORNIA NAVEL ORANGE FORECAST

The initial 2002-03 Navel orange forecast is 80.0 million (37.5-pound) cartons, 18 percent above last season's crop of 68.0 million cartons. Of the total forecast, 77.5 million cartons are estimated to be in the Central Valley.

Survey data indicated an average fruit set of 466 oranges per tree, with a September 1 diameter of 2.200 inches. This is the highest fruit set since the 1992-93 season.

CALIFORNIA CENTRAL VALLEY NAVEL ORANGES 1/

Crop Year 2/	Final Utilized Production 3/ (37.5-Lb. Cartons)	Bearing Acres	Average Trees Per Acre	Average Set Per Tree	Average September 1 Diameter 4/ (Inches)	Average March 1 Diameter 4/ 5/ (Inches)
1986-87	58,566,000	94,997	128	544	2.169	2.847
1987-88	53,588,000	96,110	126	361	2.343	3.195
1988-89	58,326,000	98,766	126	570	2.195	2.761
1989-90	79,242,000	101,525	125	541	2.250	2.820
1990-91	25,514,000	104,560	124	498	2.213	---
1991-92	60,406,000	102,000	124	---	---	---
1992-93	81,034,000	102,612	121	572	2.296	3.021
1993-94	63,800,000	106,381	121	452	2.365	3.090
1994-95	66,358,000	107,049	121	457	2.232	3.063
1995-96	69,750,000	113,000	121	460	2.258	2.994
1996-97	71,700,000	115,000	121	359	2.470	3.208
1997-98	81,000,000	116,500	121	407	2.481	3.195
1998-99	37,000,000	118,000	121	380	2.184	---
1999-00	76,000,000	119,000	122	458	2.224	3.049
2000-01	68,000,000	122,000	122	347	2.311	3.120
2001-02	65,000,000	122,000	122	264	2.483	3.172
2002-03	77,500,000	122,500	122	466	2.200	3.000

1/ Data for final utilized production and bearing acres are from the orange industry. Acreage data are the number of acres with trees of bearing age (more than four years old). Some fruit could have been picked from trees younger than four years old, but not enough to consider the tree full-bearing.
2/ Data for 1990-91 and 1998-99 (freeze years) were not used in forecasting the 2002-03 crop. An Objective Measurement Survey was not conducted for the 1991-92 season due to lack of funding.
3/ California Agricultural Statistics Service preliminary forecast for 2002-03.
4/ Size data for 1984-85 through 1993-94 are from the Navel Orange Administrative Committee, while the data since 1993-94 are from the orange industry.
5/ Data for 2002-03 were derived using the five-year average growth size from the orange industry.

PISTACHIO PRODUCTION FORECAST

California pistachio production for 2002 is forecast at a record 280 million pounds. The 80 percent confidence interval is from 245 to 315 million pounds. This means that the results of our sampling procedures will encompass the true mean 80 percent of the time. This forecast is based on an objective measurement survey conducted by the California Agricultural Statistics Service under the sponsorship of the California Pistachio Commission. The survey collects data such as clusters per tree, nuts per cluster, percent of bearing trees, as well as weight and size information. In recent years, production has remained relatively stable as Pioneer Gold rootstock (verticillium wilt resistant) has increasingly replaced the older Atlantica rootstock.

CALIFORNIA PISTACHIO OBJECTIVE MEASUREMENT SURVEY DATA – STATE TOTALS 1/

Year	Samples Completed 2/	Estimated Average Number Of Clusters Per Tree	Estimated Percent Of All Spaces That Contain		Count Data			In-Hull Data 3/			Kernel Data 3/			
			Bearing Trees	Pollinators	Nuts Per Cluster (Filled and Blank)	Percent Of Nuts Filled	Est. Total Number Of Filled Nuts Per Tree	Weight Per Nut (Includes Blanks)	Weight Per Nut (Filled)	In-Hull Cross Suture	Average Weight Per Kernel	Suture	Cross Suture	Length
1990	373	1,479	85.6	6.3	10.1	73.5	10,942	2.43	---	14.14	0.871	10.12	9.32	16.11
1991	389	439	87.7	5.9	11.1	77.8	3,794	2.99	---	15.41	0.963	10.69	10.11	16.68
1992	394	1,670	86.3	6.8	7.2	70.4	8,433	3.04	---	15.26	1.240	10.96	10.35	17.79
1993	---	---	---	---	---	---	---	---	---	---	---	---	---	---
1994	491	797	87.4	6.0	11.9	80.6	7,647	2.92	---	15.02	0.952	10.43	9.68	16.97
1995	586	974	89.9	5.4	9.2	78.9	7,114	3.07	3.26	15.51	0.949	10.33	9.94	16.40
1996	562	739	89.3	5.3	10.3	65.7	5,007	2.52	2.72	14.87	0.775	9.76	9.08	15.70
1997	642	1,049	89.5	5.4	10.4	76.0	8,326	2.78	2.92	14.92	0.896	10.56	9.60	16.55
1998	610	895	90.9	5.0	13.8	77.2	9,542	2.86	3.04	15.05	0.828	10.31	9.51	16.48
1999	603	591	90.5	5.6	11.1	70.4	4,630	2.82	3.09	15.29	0.928	10.16	9.78	16.72
2000	555	992	92.8	4.5	13.0	72.2	9,321	2.57	2.84	14.86	0.870	10.01	9.33	16.25
2001	632	805	92.6	5.2	12.0	70.0	6,737	2.87	3.13	15.59	1.020	10.52	9.99	16.71
2002	623	1,108	94.0	4.7	13.8	71.9	11,009	2.65	2.80	14.46	0.889	10.16	9.35	16.34

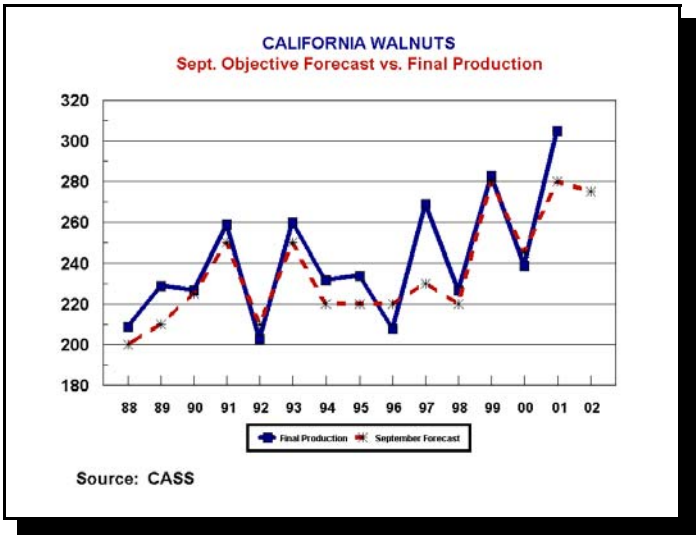
1/ Survey was not conducted in 1993.
2/ Number of samples is based on the August Pistachio Objective Measurement Survey. There are two trees per sample.
3/ All weights are in grams. Suture, cross suture and length measurements are in millimeters.

WALNUT PRODUCTION FORECAST

The 2002 California walnut production is forecast at 275,000 tons, down 10 percent from 2001's production of 305,000 tons. This forecast is based on the 2002 Walnut Objective Measurement (O.M.) Survey, which was conducted August 1 through August 28, 2002.

The 2002 Walnut O.M. Survey utilized a total of 679 blocks with two sample trees per block. Survey data indicated an average nut set of 1,572, down 9 percent from 2001's average of 1,719. The Hartley nut set was down 4 percent; Chandler, was down 24 percent; Serr, was down 6 percent; Franquette, was up 14 percent from 2001. Percent of sound kernels in-shell was 96.3 percent Statewide. In-shell weight per nut was 22.0 grams, while the average in-shell suture measurement was 32.4 millimeters. The average length in-shell was 38.5 millimeters.

Estimated nut sets, sizing measurements, average number of trees per acre, and estimated bearing acreage were used in the regression formulas.



CALIFORNIA WALNUT OBJECTIVE MEASURMENT SURVEY DATA – NUTS SET PER TREE BY DISTRICT

Year	Coast 1/	Sacramento Valley 2/	San Joaquin Valley 3/	State 4/
1991	1,955	2,620	2,210	2,340
1992	1,567	1,902	1,380	1,604
1993	1,530	2,703	1,596	2,068
1994	1,813	1,961	1,602	1,773
1995	1,420	2,253	1,451	1,777
1996	1,362	1,836	1,497	1,630
1997	1,128	2,233	1,439	1,753
1998	1,070	1,654	1,253	1,407
1999	1,355	2,180	1,250	1,709
2000	1,195	1,812	1,204	1,483
2001	937	2,020	1,478	1,719
2002	1,254	1,982	1,142	1,572

1/ Coast includes: Contra Costa, Lake, Monterey, Napa, San Benito, San Luis Obispo, Santa Clara, and Sonoma counties.
2/ Sacramento Valley includes: Butte, Colusa, El Dorado, Glenn, Sacramento, Solano, Sutter, Tehama, Yolo, and Yuba counties.
3/ San Joaquin Valley includes: Fresno, Kern, Kings, Madera, Merced, San Joaquin, Stanislaus, and Tulare counties.
4/ District and State averages are derived by weighting county averages by county bearing acreage figures.

CALIFORNIA WALNUT OBJECTIVE MEASUREMENT SURVEY DATA -- STATE TOTALS

Year	Bearing Acres	Total Production	Kernel Grade - Percent Sound	In-Shell			
				Weight	Width	Length	Cross-Width
		Tons		gm	mm		
1991	181,000	259,000	95.5	20.8	31.5	39.0	31.1
1992	178,000	203,000	96.9	22.7	32.6	39.5	32.9
1993	185,000	260,000	95.8	22.9	32.6	40.0	32.5
1994	189,000	232,000	95.6	22.1	32.2	39.4	32.2
1995	193,000	234,000	93.1	20.8	31.7	39.2	31.3
1996	192,000	208,000	94.4	22.1	32.3	39.0	32.5
1997	193,000	269,000	97.3	22.9	32.3	38.6	32.6
1998	193,000	227,000	94.4	21.4	31.9	39.5	31.8
1999	191,000	283,000	97.9	23.0	32.2	39.4	32.7
2000	193,000	239,000	96.9	21.2	32.2	38.2	32.8
2001	196,000	305,000	97.8	21.5	31.7	38.3	31.6
2002 1/	200,000	275,000	96.3	22.0	32.4	38.5	32.7

1/ Bearing years include plantings of the following: Chandler, Chico, Howard, Tulare (1998 & Earlier); 50-55, 59-124, 4946, Amigo, Ashley, Bardoni, Cisco, Earhorn, Grove, Gustine, Honeycutt, Houston, Jensen, Lompoc, Marchetti, Nuggett, Payne, Pedro, Serr, Sunland, Tehama, Trinta, UCD 67-13, Vina, Westside (1997 and Earlier); Franquette, Franquette Scharsch, Mayette, Placentia, Poe, Willsons/Willsons Wonder, Woodland (1995 & Earlier); all other varieties not specified (1996 & Earlier).

FLORIDA CITRUS

August was a very wet month. Virtually all of Florida's citrus producing counties reported above average rainfall. This was the third consecutive month this State's citrus growers had above average moisture levels. Most of the lakes, ponds, streams, and water reservoirs are currently at or above their normal levels. Growers and caretakers have been pumping water out of their ditches into main canals that eventually end in some of Florida's major waterways. The tropical summer weather patterns have generated a lot of new growth on trees of all ages. New crop fruit has been making very good progress. Fruit sizes are good in all well-cared-for groves. Crews from some fresh fruit packing houses have been testing early bloom fruit for the first shipments of the 2002-03 season. Some early tangerines and a few grapefruit were picked the last few days of the month and were expected to be shipped around or before the first of September. Several other packing houses are expected to start packing early tangerines, grapefruit and Navels the first week of September. Caretakers were very active during August keeping the cover crops mowed down and the vines cut out of the citrus trees. Dead trees are being pushed out and burned in all areas. Resets are being planted in the larger groves. Growers are fertilizing, spraying, and applying herbicides.